

RECORDS RETENTION AND DISPOSAL SCHEDULE

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Agency St. Mary's County		Division Office on Aging -In-Home Services
Item No.	Description	Retention
1.	<u>In-Home Service Aide Reporting Forms</u> Tally sheet forms used by Aides to report daily service activities to clients. Each form summarizes a month's service for one client. Forms are used to compile units of service for quarterly reports.	Retain 1 year, then destroy.
2.	<u>Time Sheets</u> Copies of time sheets for Senior Aides. Time sheets are filled out by the aides, reviewed by supervisor and signed by aides. Originals sent to State Office; copies held in local office for reference.	Retain 3 years. Retain current year and 1 year prior in office, then transfer to County Records Center and Archives, to be held for 2 years then destroy.
3.	<u>Administrative Files</u> Copies of grants, budget printouts, printed reference and promotional materials, correspondence, blank forms copies of personnel files (originals with State Office) and worksheets for reports.	Retain 1 year or until administrative value ceases, then destroy.
4.	<u>Log-in Sheets</u> Phone log for client messages. Entries contain name of caller, message and aide relayed to. Information was included in units of service for quarterly reports.	Retain 1 year, then destroy.
5.	<u>Senior Coordinated Community Care-Client Files Active (Gateway II)</u> Folders on active clients containing STEPS evaluations (done by Health Department), intake forms, income criteria information.	Retain in office until transferred to inactive file (see item 6).
6.	<u>Senior Coordinated Community Care - Clients Files-Inactive (Gateway II)</u> Client folders containing STEPS evaluations, eligibility forms and personal history forms for former participants in program.	Retain 7 years after death of client. Retain 1 year in office, then transfer to County Records Center and Archives.

Schedule approved by Department,
Agency, or Division RepresentativeSchedule authorized by and destroy after
6 years.

Bernice C. Smith, Deputy Director Long Term Care
Signature Title Date 9-7-89

Jan Blodgett
County Archivist
Shirley Ann
State Archivist

9/12/89
Date

1/4/89
Date

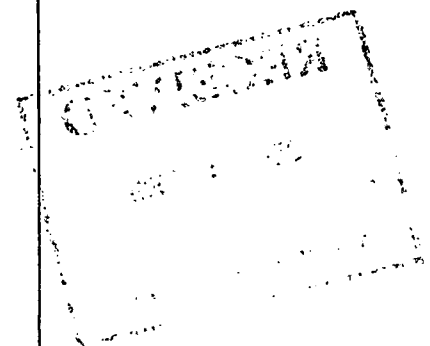
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation sheet)

No. C-647

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No. 2062

Item No.	Description	Retention
7.	<u>Senior Coordinated Community Care--Administrative</u> Copies of line-item expenditures, intake forms, fiscal worksheets, contracts and invoices related to Senior Coordinated Community Care program. All of the fiscal information is non-record copies.	Retain for 1 year or until administrative value ceases. then destroy.
8.	<u>Lifeline Services</u> Printed materials, promotional materials, monthly monitor reports. All bills related to monthly reports filed with Fiscal division, reports contain notices of any problems.	Retain printed materials until superceded or until administrative value ceases, then destroy. Retain monthly reports for 1 year, then destroy.
9.	<u>Respite Care Program</u> Files of applications of Respite Care Program workers and references. The Respite Care Program was transferred to Department of Social Services and names of workers given to the Dept.	Retain 1 year from date of last application, then destroy.



INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

2647
AGENCY RECORDS INVENTORY

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1. DEPARTMENT/AGENCY

St. Mary's County

2. DIVISION

Office on Aging

3. UNIT

In-Home Services

DEFINITION-RECORD SERIES--A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Respite Care Program

5. EARLIEST YEAR/LATEST YEAR

Inactive TO

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Files of applications of respite care workers and references. The Respite Care Program was transferred to Department of Social Services and names of workers given to that department.

7. RECORD SERIES FORMAT(S)

☐ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ SOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 1

10. ANNUAL ACCUMULATION

☐ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER

11. FILE IS USED

☐ DAILY ☐ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER transfer

NUMBER MONTH(S) YEAR(S)

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

(IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☒ YES ☐ NO

(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS

☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 1 year after last application filed, then destroy.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
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In-Home Services

DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

In-Home Services Aide Reporting Forms

5. EARLIEST YEAR/LATEST YEAR

12/86 TO 1989

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Tally sheet forms used by Senior Aides to report daily service activities to clients. Each form summarizes a month's service for one client. Forms are used to compile units of service for quarterly reports.

7. RECORD SERIES FORMAT(S)

- ☒ LETTER SIZE ☐ MICROFILM
☐ LEGAL SIZE ☐ COMPUTER TAPE
☐ SOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☐ ALPHABETICAL
☐ NUMERICAL
☒ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
2 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
1 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

11. FILE IS USED

- ☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 4 ☒ MONTH(S) ☐ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

- (IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☒ YES ☐ NO

(IF YES, CITE LAW(S) & REGULATION(S))

MD Annotated Code, State Government §10-616c

16. AUDIT REQUIREMENTS

- ☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

- ☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 1 year, then destroy.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

c647

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

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1. DEPARTMENT/AGENCY
St. Mary's County

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3. UNIT
In-Home Services

DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE
Time Sheets - Senior Aides

5. EARLIEST YEAR/LATEST YEAR
1986-TO 1989

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Copies of time sheets for Senior aides. Time sheets are filled out by the Aides, reviewed by supervisor and signed. Originals are sent to State Office; copies held in local office.

7. RECORD SERIES FORMAT(S)
☒ LETTER SIZE ☐ MICROFILM
☐ LEGAL SIZE ☐ COMPUTER TAPE
☐ SOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE
☐ ALPHABETICAL
☐ NUMERICAL
☒ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME
☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
1 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION
☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
1 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

11. FILE IS USED
☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER
1 ☐ MONTH(S) ☒ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)
Garvey Center - In-Home Services Office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?
(IF YES, SPECIFY AGENCY OR OFFICE)
☒ YES ☐ NO State Office on Aging

15. ACCESS RESTRICTIONS ☒ YES ☐ NO
(IF YES, CITE LAW(S) & REGULATION(S)
MD Annotated Code, State Gov. §10-616h

16. AUDIT REQUIREMENTS
☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)
☐ YES ☒ NO

18. RECOMMENDED RETENTION
Retain 3 years. Retain current year and 1 year prior in office, then transfer to County Records Center and Archives.

19. NAME AND TITLE OF PREPARER
Jan Blodgett/County Archivist

20. TELEPHONE NUMBER
(301) 475-7844

21. DATE
9/7/89

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
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AGENCY RECORDS INVENTORY

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1. DEPARTMENT/AGENCY
St. Mary's County

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DEFINITION-RECORD SERIES--A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE
Administrative Files

5. EARLIEST YEAR/LATEST YEAR
1986 TO 1989

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Copies of grants, budget printouts and printed reference material used as backup copies and quick reference. Also includes correspondence, blank forms, copies of personnel files (Originals with State Office) and worksheets for reports.

7. RECORD SERIES FORMAT(S)

☒ LETTER SIZE ☐ MICROFILM
☐ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
1 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

☒ FILE DRAWER(S)
1 ☐ MICROFILM REEL(S)
NUMBER ☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)

11. FILE IS USED
☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER
2 ☐ MONTH(S) ☒ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)
Garvey Center - In-Home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?
(IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO
(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS
☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)
☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 1 year or until administrative use completed.

19. NAME AND TITLE OF PREPARER
Jan Blodgett/County Archivist

20. TELEPHONE NUMBER
(301) 475-7844

21. DATE
9/7/89

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
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DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Log-In Sheets

5. EARLIEST YEAR/LATEST YEAR

_____ TO _____ 1987

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Phone log for client messages. Entries contain name of caller, message and aide message relayed to. Information was included in units of service for quarterly reports.

7. RECORD SERIES FORMAT(S)

☒ LETTER SIZE ☐ MICROFILM
☐ LEGAL SIZE ☐ COMPUTER TAPE
☒ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

☐ ALPHABETICAL
☐ NUMERICAL
☒ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 1

10. ANNUAL ACCUMULATION

☐ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER _____

11. FILE IS USED

☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

NUMBER 4 ☒ MONTH(S) ☐ YEAR(S)

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

(IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO
(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS

☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 1 year, then destroy.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

INSTRUCTIONS -- TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

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1. DEPARTMENT/AGENCY

St. Mary's County

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Office of Aging

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In-Home Services

DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Senior Coordinated Community Care (Gateway II) - Client Files

5. EARLIEST YEAR/LATEST YEAR

active TO inactive

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Folders on active clients containing STEPS evaluation, intake form, income criteria information.

7. RECORD SERIES FORMAT(S)

☒ LETTER SIZE ☐ MICROFILM
☐ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

☐ ALPHABETICAL
☒ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
2
NUMBER

10. ANNUAL ACCUMULATION

☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
6
NUMBER

11. FILE IS USED

☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

clients leave MONTH(S) ☐ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

(IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☒ YES ☐ NO

(IF YES, CITE LAW(S) & REGULATION(S))

MD Annotated Code State Gov. §10-616c

16. AUDIT REQUIREMENTS

☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain in office until transferred to inactive files.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

INSTRUCTIONS - TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
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DEFINITION-RECORD SERIES - A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Senior Coordinated Community Care - Client Folders

5. EARLIEST YEAR/LATEST YEAR

inactive TO

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)
Client folders for deceased clients containing STEPS evaluation, eligibility form, and personal history cards.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 1

10. ANNUAL ACCUMULATION

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 1"

11. FILE IS USED

- ☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 1 MONTH(S) ☐ MONTH(S) ☒ YEAR(S)

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

- (IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO

(IF YES, CITE LAW(S) & REGULATION(S))

MD Annotated Code State Gov. §10-616c

16. AUDIT REQUIREMENTS

- ☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

- ☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 7 years after death of client.
Retain 1 year in office, then transfer to County Records Center and Archives.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
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In-Home Services

DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Senior Coordinated Community Care - Administrative files

5. EARLIEST YEAR/LATEST YEAR

1986 TO 1989

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Copies of line-item expenditures, intake forms/applications, fiscal worksheets, contracts and invoices related to Senior Coordinated Community Care program. All of the fiscal information is duplicated and the record copies held by the Finance Division of the Office on Aging. These files used for director's backup and reference.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 3

10. ANNUAL ACCUMULATION

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
NUMBER 6"

11. FILE IS USED

- ☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 1 MONTH(S) ☐ MONTH(S) ☒ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home Services office

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

(IF YES, SPECIFY AGENCY OR OFFICE)
☒ YES ☐ NO Finance Division/Office on Aging

15. ACCESS RESTRICTIONS ☐ YES ☒ NO
(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS

- ☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

- ☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain 1 year or until administrative value ceases.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

0647
AGENCY RECORDS INVENTORY

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1. DEPARTMENT/AGENCY

St. Mary's County

2. DIVISION

Office on Aging

3. UNIT

In-Home Services

DEFINITION-RECORD SERIES--A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Lifeline Service

5. EARLIEST YEAR/LATEST YEAR

active TO inactive

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

Printed materials, promotional materials, monthly monitor reports. All bills related to monthly reports filed with fiscal division, reports contain notices of any problems with the system.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)
1
NUMBER

10. ANNUAL ACCUMULATION

- ☒ FILE DRAWER(S)
4" ☐ MICROFILM REEL(S)
NUMBER ☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)

11. FILE IS USED

- ☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 1 ☐ MONTH(S) ☒ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

Garvey Center - In-Home Services

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

- (IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO

(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS

- ☒ NONE ☐ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

- ☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain printed material until superceded or administrative value ceases. Retain monthly monitoring reports for 1 year, then destroy.

19. NAME AND TITLE OF PREPARER

Jan Blodgett/County Archivist

20. TELEPHONE NUMBER

(301) 475-7844

21. DATE

9/7/89